DEPARTMENT OF HEALTH & HUMAN SERVICES · USA

Indian Health Service
Office of Information Technology
Resource and Patient Management System

Standards and Conventions

Documentation Style Guide

Version 1.3
September 2005

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1.0 Introduction

This in-house style guide was created to make the RPMS documentation produced at the OIT more consistent amongst developers and throughout time. While this document will take precedence over external and general style guides, it is by no means the authority on documentation requirements. The RPMS Standards and Conventions (SAC) is the final authority on formal, high-level documentation policy.

This style manual is based primarily on a combination of internal documentation needs, Appendix F of the OIT SAC, and the Chicago Manual of Style. If an issue is not addressed in this internal style guide, please consult The Chicago Manual of Style (15th edition) or the Merriam Webster Collegiate Dictionary.

Because the web is also a convenient and cost-effective tool, the following resources can also be consulted when further clarification is necessary:

- The Merriam Webster's Online Dictionary: http://www.m-w.com/dictionary.htm
- Webopedia (A computer and Internet Dictionary): http://www.pcwebopaedia.com/

When an issue is not addressed in this style guide and there is a disagreement between these online sources and the paper sources listed above, the paper source will overrule the online source.

2.0 Usability Guidelines

2.1 Eliminate Superfluous Information

Superfluous information creates the following usability issues:

- Increases the amount of text that a reader has to understand
- Increases the time and effort the reader invests to access information
- Takes up space in the reader's short-term memory
- Drains the reader's mental resources

Superfluous information includes:

- Unnecessary adjectives and adverbs
- Information about irrelevant topics
- Personal opinions
- Speculation about future product functions
- Rhetorical questions
- Over-exposed legal information
- Over-exposed author information

2.2 Create Consistent Structures

Create your document with repeated structures when possible, using the same hierarchy of sections and the same type of information in each section. By repeating the hierarchy and structure of the information throughout the document, you train users to look for certain types of information in certain places and reduce their uncertainty when approaching the documentation.

The structure of a document is like a street map. Obviously, a street map that is consistent across the whole of a city area is a better navigation tool than an inconsistent one. The intrinsic repeated structure of your document needs to be orderly, logical, and consistent. If you are going to keep the document at the overview level, make sure that all topics are covered in the same level of detail. If you are going to give detailed, step-by-step instructions for using a particular function, make sure you give the similar detailed instructions for all functions or give the user a logical explanation for the discrepancy (Only including detailed procedures in the overview/reference guide for new functions, for example).

2.3 Use Modular Information Blocks

Most readers want to find one piece of information at a time. They are searching for a specific piece of information. They do not want to read of piece of technical documentation for the intrinsic enjoyment of reading prose.

To meet the reader's information requirements, create modular blocks of relevant information about specific topics. Modules of information are easier to understand

and update than long passages of unstructured materials. Typically, a modular block of information is a stand-alone entity that contains the following information elements.

Header
Make the headers expressive. Tell the reader what to expect from this type of module. When the reader encounters a similar header, then the type of information content is already familiar.

Text Information
Break up your text information into discrete submodules of related information grouped into separate paragraphs.

Integrated Supporting Elements
Information elements to support the text information can include lists, procedures, tables, and graphics.

If each documentation module passes the information correctly to the reader, then the reader performs the correct action. Inconsistent documentation modules can confuse the reader.

You need to create modules short enough to keep scrolling or page turning to an absolute minimum.

2.4 Use Consistent Language

School teachers tell us to vary our writing to hold the interest of the reader. Technical documentation requires the opposite. Use the same vocabulary for the same purpose throughout your documentation. Furthermore, when a team of writers is working together, they must strive to achieve a single voice.

Repeated use of consistent language builds long-term memory and reduces the demand on the short-term memory. The reader can access the real information content of your text.

Other language points you need to consider:

- Words with Latin or Greek roots are harder to understand than equivalent plain English words. (This is true except for standard Latin-based terms such as etc., i.e., re:)
- Do not use non-English words. Some readers will not understand the non-English word and even readers who do understand will have to pause and think about it for a moment.
- Short words are easier for a reader to process than long words.

- The active voice is easier to understand than the passive voice. Use of the imperative is acceptable in the OIT documentation.

2.5 Use Consistent Typographic Conventions

Typographic conventions such as capitalization rules, punctuation, and emphasis tell readers what to expect. Consistent typographic conventions provide the inner structure of a document. Inconsistent typographic conventions confuse and distract the reader.

2.6 Translatability

While the OIT documentation is not formally translated into other languages, our user group is potentially an English as a Second Language (ESL) group. When users are reading in a language other than their native one (and possibly translating mentally), they may encounter many of the difficulties that translators encounter when they are formally translating a document. Therefore, OIT's technical documentation should be translation-friendly.

2.6.1 Cultural Differences

Conventions that you take for granted in your own language and culture might be different in other cultures. Keep in mind the following guidelines when you write.

- Do not use political or religious references. Do not use examples from political or religious spheres.

- Do not use humor. Humor is very culturally dependent and understanding can vary between races, genders, religion, social class, etc.

2.6.2 Grammar and Translatability

The topics addressed in this section cover most of the most common causes of translation errors. You can use basic grammar guidelines to avoid most situations that cause difficulty for translators and readers. They are also very helpful for readers with limited reading skills and should be followed regardless of the reader's native language.

3.0 General Rules

3.1 Dates

Use the release date (Month Year format) on the title page and in the document footer.

3.2 Version Number

Spell out and capitalize (or initial cap) the word *version* when used on the manual cover (e.g., Laboratory Version 5.0). Abbreviate *version* to a lower case *v* without a space when used in the header or footer (e.g., Laboratory v5.0). Do not use a period or a space after the *v* when abbreviating *version*.

3.3 Headers and Footers

Headers and footers are required for all manuals. The information contained in the header is the package name, package namespace, and version number. The information contained in the footer is the manual type, the page number (see section 5.2), the chapter or section name (level 1 heading only), and the release month and year.

The title page should not have a header or footer at all. Lines separating the header and footer from the text are mandatory.

3.4 Margins

All documents should contain 1-inch margins on all sides. Certain pages, like externally created flowcharts and graphics can be exempted from this restriction when necessary.

3.5 Using Styles

Styles streamline the updating and formatting process of documentation. Use styles to align and format text whenever possible. When using styles, make as few manual adjustments as possible, but also avoid making an unnecessary number of new or specific styles. The use of styles is required to comply with Section 508, as it permits more accurate tagging by the Adobe Acrobat program.

3.6 Page Dimensions

All documents will be created for an 8.5- inch by 11-inch page in portrait orientation when possible.

3.7 Package Names

Use initial capitalization when referring to package names (e.g., Laboratory, Patient Registration). When you refer to the package for the first time, spell out the full package name and follow it with the abbreviation or namespace in parentheses. After you have introduced a package in this fashion, you may refer to it by just the abbreviation or synonym throughout the document. Always use the word *package* when you are referring to a package, but do not capitalize *package* (unless the entire phrase is initial capped, such as in headings).

Problem: The Radiology Package can be downloaded.

Problem: Radiology can be downloaded.

Problem: The radiology package can be downloaded.

Problem: The RA package can be downloaded.

Solution: The Radiology package (RA) can be downloaded. The RA package is…

3.8 Text Alignment

In most cases, text is to be presented flush left or justified with no paragraph indents and no hyphenation.

3.9 Text Spacing

Because the text is presented flush with the left margin with no paragraph indents (section 3.8), blocks of regular text should be set to have a 12-point space after a paragraph. Bulleted lists should have 0-6 points of space between text chunks, depending on the density of the text. For example, a bulleted list of single words could have 0-3 points of space between lines while a bulleted list of sentences or statements should have between 3 and 6 points of space between them. Regardless of list spacing, the final bullet should have a 12-point space between it and the following paragraph.

The text styles in the document have already been configured to support these spacing standards and can be copied using the Styles Organizer.

3.10 Fractions

Use numerals for fractions in tables and in units of measurement, but spell out fractions in prose. Use a space between a numeral and a related fraction. If a fraction is used in a compound modifier, insert a hyphen between the fraction and the unit of measurement.

Problem: You will see ½ of the patient names on the first screen.

Problem: You can set your system to automatically create 1 ½ inch margins.

Solution: You will see one half of the patient names on the first screen.

Solution: You can set your system to automatically create 1-½ inch margins.

4.0 Font and Alignment

4.1 Standard Font and Type System

Use Times New Roman 12-point font for standard documentation text.

> **Example:** Type the name of the patient whose file you wish to edit at the "Name:" prompt.

Use Arial 12-point font to indicate user input. You may also use **Arial 12**-point bold for user input. Be consistent throughout a document.

> **Example:** Type PTRG at the main menu prompt.

> **Example:** Type **PTRG** at the main menu prompt.

Use `Courier New 10`-point font to indicate computer messages or recreate computer screens. Recreated screens should also be boxed with a 1-point border and slightly shaded, if possible.

> **Example:** The `Patient Has Been Added` message displays.

4.2 Italic Type

Use italic type for small areas of emphasis. When referring to a word as a word, use italics to set the word apart from the rest of the text.

> **Example:**
> The word *prompt* usually refers to a system question that appears on your screen. Prompts indicate that the system requires user input before it can continue its task.

4.3 Underlined Type

Underlined type is not generally used. Do not use underlining to emphasize particular sections of text or set headings apart from the text. These types of emphasis are done more professionally with font style, font size, bolding, placement, or italics.

4.4 Bold Type

Bold type should be used sparingly and only after other means of emphasis have been exhausted (moving text to beginning or end of a paragraph, etc.). Bold type can and should be used to emphasize headings, easing navigation.

4.5 Heading and Subheading Alignment

Place all headings and subheadings at the left margin. Do not indent incrementally with the heading level.

4.6 Heading Font

Distinguish headings with font size, font type (Arial), bold weighting, or italics. Do not underline headings. (The Heading 1-Heading 4 styles in this document meet the standards and can be transferred to your document through the Style Organizer.)

5.0 Numbers and Numbering

5.1 Numbers in Text

Numbers zero through nine should be spelled out in text. Numbers 10 and above can be left in numerical format. This rule does not apply to numbers being used to organize a list, in page numbers, as a measurement, or in screenshots.

Spell out common units of time that are greater than one second, from zero to nine. Spell out approximations and any number that begins a sentence. Spell out extreme values (such as *million*), but precede the value with a numeral.

Also use numerals:

- For negative numbers
- For most fractions, percentages, decimals, and measurements
- For units of time smaller than one second
- For references to bits and bytes

5.2 Page Numbering

If you know that your users will only print your documentation out (use sparingly):
Pages should be numbered in the 1-1 format, where the first number corresponds to the section number and the second number corresponds to the page number within that section. For example, section one might include pages 1-1 through 1-8 but section two will begin with 2-1 (representing the first page of section two). This numbering strategy facilitates releasing change pages or updated sections as necessary and reduces the number of pages users have to reprint with a new package or patch release.

The only exceptions to this numbering system are the table of contents, acknowledgement, and preface. These pages should be numbered with lowercase roman numerals (i, ii, iii, iv, v, etc.) and no section number should be included. The title page should not be numbered at all.

If you do not know how your users will use the documentation or you expect them to refer to it onscreen:
Pages should be numbered in standard format, starting with page 1 at the Introduction. The only exceptions to this numbering system are the table of contents, acknowledgement, and preface. These pages should be numbered with lowercase roman numerals (i, ii, iii, iv, v, etc.). The title page should not be numbered at all.

5.3 Figure Numbering

Figures should be numbered in the 1-1 format, where the first number corresponds to the section number and the second number corresponds to the figure number within that section. For example, the first figure in section one would be Figure 1-1, the third figure in section two would be Figure 2-3, etc. The figure number will appear in the figure caption. For more on figure captions, see section 12.0.

5.4 Item/ List Numbering

Items in lists should be numbered ONLY if the items must be completed in a particular order or if the numbering is critical to understanding the list or items. In cases where there is no explicit reason to use a numbered list, use a bulleted list instead.

5.5 Heading Numbering

All headings between heading 1 and heading 4 will be numbered in legal/outline style (1.0, 1.1, 1.1.1, 1.1.1.1, etc.). The headings in this document meet all heading requirements and can be copied to your document through the Style Organizer.

6.0 Page Breaks

6.1 Standard Page Breaks

Insert a Section Break (Next Page) between the title page and the table of contents and before all level 1 headings. Unless you have a very good reason to include section breaks before other heading types (in a reference guide where pages must stand alone, for example), do not use section breaks elsewhere in the document.

6.2 Hard Page Breaks

Do not use hard page breaks to keep text together across a natural page line. Instead, set the Keep Lines Together or Keep With Next paragraph properties to *on* and allow the Word program to determine the best place to break the text.

6.3 Forcing Even and Odd Start Pages

Do not use the Section Break (Odd Page), or Section Break (Even Page) options when inserting section breaks. All OIT documentation is designed to be viewed onscreen (according to the Paperwork Reduction Act of 1996) and extra pages included to start sections specifically on even or odd pages only complicates online reading. In addition, users who chose to print a paper copy of the manual do not always have access to printers that allow double-sided printing. In these cases, you are forcing users to print unnecessary blank pages.

7.0 Lists

7.1 Punctuation in Lists

If one item is a complete sentence that stands alone, put a period at the end of every item in that list.

7.2 List Numbering

Items in lists should be numbered ONLY if the items must be completed in a particular order or if the numbering is critical to understanding the list or items. In cases where there is no explicit reason to use a numbered list, use a bulleted list instead.

7.3 Introducing Lists and Procedures

Introduce a list or a procedure with a colon at the end of a complete sentence. Do not introduce your lists with sentence fragments.

Problem: In the Properties dialog box set:

Solution: In the Properties dialog box, set the following parameters:

Exceptions: Single nouns in front of a colon are acceptable, as opposed to a sentence fragment. Also note the use of following in this context.

8.0 Appendices

8.1 Referring to Multiple Appendices/Appendixes

While many dictionaries consider both *appendices* and *appendixes* correct terms for referring to more than one appendix, OIT will use the more conservative and recognizably correct *appendices*.

Problem: Refer to the charts in Appendixes A-F for more detailed information.

Solution: Refer to the charts in the Appendices A-F for more detailed information.

8.2 Content of Appendices

Appendices are considered supplemental information and should be used for appropriate materials such as listings of descriptions or definitions of data elements, sample reports generated by the package, summaries of commands, and lists of supportive reference materials.

8.3 Appendix Titles

Appendices should be treated independently and lettered accordingly. To assist users in navigating appendix information, all appendices will be labeled/ titled in the following format.

Example: 11.0 Appendix A: List of Names

This format allows users to find appendix information by the section number, the appendix letter reference, or the content. Do not use a hyphen or em-dash between the appendix letter and the description/ title.

Problem: 11.0 Appendix A— List of Names

Solution: 11.0 Appendix A: List of Names

8.4 Appendix Location

Appendices should placed after the Glossary but before the Contact Information section.

9.0 Screenshots and Screenshot Callouts

9.1 Screenshots

9.1.1 Using Screenshots as Figures

If a screenshot represents a complete page or pop-up dialog box, it should be treated as a figure. If a screenshot represents only a portion of a page or pop-up dialog box, it can be treated as a figure at the writer's discretion. If the majority of your screenshots are partial ones or they are referred to heavily in the text, it is best that they be treated as figures.

9.1.2 Using Default Settings

As much as possible, use the default settings for the desktop when you take a screenshot. For GUI screenshots, include the window frame when you are taking a screenshot of the window (when space allows). For roll-and-scroll screenshots, do not include the window frame, as many users are using dumb terminals and do not have an awareness of the RPMS system in a windowed environment.

9.1.3 Screenshot Size

There are three acceptable screenshot sizes.

When you have recreated a screenshot through a text capture (rather than an image capture), you should get approximately 75 characters across a standard page. This screenshot type will fill the page from margin to margin.

When you have taken an image capture but don't intend to use callouts (or your callouts will fit within the borders of the screenshot), the screenshot image should not be changed.

When you have taken an image capture and intend to use a scholar's column or use callouts outside the borders of the screenshot, the screenshot image should be set to 62% of the original size.

9.1.4 Screenshot Cropping

If you need to crop the window frame from the screenshot, you must do so before you resize the graphic in Word. The standard crop measurements are:

- Left: 0.05”
- Right: 0.75”
- Top: 0.75”
- Bottom: 0.25”

You can crop the screenshot more than this if a lot of the screenshot is blank space and you want to use the "wasted" space the full screenshot occupies. Do not over crop screenshots, though, because part of the screenshot's purpose is to orient the user to his/her location within the program.

9.1.5 Screenshot Border

Do not use drop shadow or any other special graphic effects on screenshots. If necessary, screenshots should be assigned a ½ point single solid line border.

9.1.6 Screenshot Authenticity

Screenshots should appear as close as possible to what the user really sees onscreen. Cropping for the sake of space in acceptable as long as the user can still use the image to orient him/herself on the screen.

Do not make any unnecessary changes to spelling, grammar, etc. in text capture screenshots. Do not use a photo editor to cleanup or alter a screenshot. Make sure that you review your screenshots before the final product is packaged to make sure that any last minute changes to the program still match your documented screenshots. Callouts and sample dialog between a hypothetical user and the system should not be so subtle that the user expects them to appear on his or her screen when he or she follows your instructions.

9.1.7 Screenshot Alt Text

All image screenshots (not text-capture screenshots) must have an alt text value set through the Web tab in the image Properties box. This alt text value must explain that the user is missing a screen shot and explain to the user what is generally being displayed. This element is required to comply with Section 508.

Problem: [alt text] Viewing a patient's insurance information.

Solution: [alt text] This screenshot illustrates which menu option to select to view a patient's insurance information.

9.1.8 Screenshots as Alternate Content Only

Per Section 508 regulations, screenshots/images cannot contain information that is not contained elsewhere in the document. If you use a screenshot to illustrate which values to enter at a series of prompts, you must also include that information textually in that section. This does not apply to text-capture screenshots, as the information is not actually in image form, it just appears to be.

9.2 Callouts

9.2.1 Callout Text

When creating callouts on image capture screenshots, use the text box function in Word to create callout text boxes. Use standard capitalization in callout text. Do not change or remove the text box border. Try to position the text box so it is not covering important information. Attempt to position the callout in a blank area, if possible.

9.2.2 Callout Lines

When visually linking callout text with the section of the image it applies to, use straight horizontal and vertical lines when possible. Diagonal lines will appear jagged. Be aware that straight callout lines may not be very clear if they closely parallel the lines around the screenshot.

Keep callout lines as simple as possible. Try to restrict callout lines to one straight line. If that is not possible, create two lines that meet at a perpendicular angle. Do not create callout lines that fold back on themselves. Callout lines should have an arrow head on the end closest to the text the callout refers to. All arrows should go from the callout text box TO the related screenshot section.

10.0 Other Graphics

10.1 HHS and IHS Logos

The HHS and IHS logos must be included on the covers of all documentation. These logos should be of equal size and should be placed in a balanced fashion on the title page only.

10.2 Image Accents

Do not use decorative images to convey information types. For example, many older RPMS manuals include a small book and pen graphic next to notes. This addition is only a distraction and a file size hog. Use textual elements (borders, shading, bolding, etc.) to emphasis notes, cautions, and warnings instead.

11.0 Figures and Tables

11.1 Figures

11.1.1 Introducing Figures

Always introduce a figure with a reference to the figure by number. Do not refer to figures by their physical location to the text. Always use the cross-reference function when referring to figure numbers.

Problem:

The figure follows and shows the window you are describing.

The figure below illustrates steps 1-3.

Solution:

The Location window displays (Figure 2-5).

Because all figures have uniquely identifiable numbers and are hyperlinked when possible, including the page number is not suggested.

Problem:	The Location window is displayed (Figure 2-5 on page 210).
Solution:	The Location window is displayed (Figure 2-5).

Do not precede the word *figure* with the word *see* unless the reference is outside parentheses and the flow of text requires its inclusion. Only capitalize the word *figure* if it is at the beginning of a sentence, set off in parentheses, or a direct figure reference. Direct figure references can be capitalized because figure cross-references in Word currently include an uppercase *F* on the word *figure*.

Problem:

The status bar in the Location window shows this information (see Figure 2-5).

The next four Figures demonstrate the process of adding a user.

Solution:

For a sample of the Location window steps, see figure 2-5.

The status bar in the Location window shows this information (Figure 2-5).

Figure 2-5 shows the alphabetical list after the search.

Refer to Figure 2-5 for an alphabetical list of topic names. (Where *Figure 2-5* is a cross-reference.)

11.1.2 Placement of Figures

Figures should be placed after the first reference to them. Figures should not be placed against each other without text to buffer them unless they are representing consecutive pages of a screen or report and there is no text to place between them.

11.2 Tables

11.2.1 Placement of Tables

Tables should be placed after the first reference to them. Tables should not be placed against each other without text to buffer them.

12.0 Captions

12.1 Caption Contents

Figure captions should include the figure number, the figure description, and reference to any step numbers that are covered in the figure.

Example:

Figure 3-30: Adding a new patient (steps 2-4a)

12.2 Punctuation in Figure Captions

Do not use a period or other punctuation at the end of a caption. Use a colon to separate the figure number from the figure description.

12.3 Capitalization in Figure Captions

Capitalize the F in *Figure* and the first letter of the figure description, just as if it were a separate sentence.

12.4 Figure Descriptions

For standard figures, the figure description should be based on the topic the figure applies to. For example, if the figure is in a section titled Add a New Patient, the figure description might be “Adding a new patient”. Notice how the first word in the section title has become a gerund in the figure description. If the figure is part of a series in the Add a New Patient section, include the steps that are demonstrated by the figure.

Example:

Figure 1-1: Adding a new patient (steps 1-3).

13.0 Abbreviations and Acronyms

13.1 Abbreviations

Usually abbreviations are familiar and do not need any explanation. Use abbreviations sparingly and not in situations where spelling the word out is more familiar or professional.

Definition: A shortened form of a word or phrase that takes the place of the full word or phrase (e.g., Dr., am, pm, etc.).

13.2 Referring to Acronyms

On first appearance, spell out the acronym and define it, if necessary, then include the acronym in (). If the acronym is the more standard usage, include the full text in the parenthesis and use the acronym. After the first usage, use only the acronym without the parenthetical explanation.

Problem: The OIT headquarters are in Albuquerque, New Mexico.

Solution: The Information Technology Support Center (OIT) headquarters are in Albuquerque, New Mexico.

Problem: Patient Chart is IHS’s first GUI program.

Solution: Patient Chart is IHS’s first GUI (Graphical User Interface) program.

13.3 Acronyms in the Glossary

All acronyms should appear in the glossary with the full phrase defined (minimum) and the definition if it will be helpful to the users.

13.4 Acronyms with indefinite articles

The article used (a or an) depends on the usual pronunciation of the acronym.

Examples: a North Carolina State University professor, an NCSU professor, a NATO treaty

13.5 Units

Do not abbreviate common units of measurement. For units that you do abbreviate, use standard abbreviations; do not invent your own abbreviations. Most standard abbreviations of units account for both singular and plural usage.

Use periods for abbreviated units that might be mistaken for a word. Insert a space between the numeral and the unit abbreviation.

14.0 Capitalization

In general, you should capitalize:

- All letters in acronyms
- The initial letter of the first word in a list
- The initial letter of the first word in a callout
- The initial letter of a key name
- The initial letter of a sentence. Avoid starting a sentence with a command name or application name if it has a lowercase initial letter.

Do not capitalize:

- When you want to emphasize something
- Names of variables

14.1 Capitalization in Lists

Capitalize the first word in each list item.

14.2 Capitalization in Captions

Use sentence style (initial cap first word only).

For window titles, match capitalization in the software. Do not capitalize the word *window*.

Example: The Open File window is displayed.

14.3 Capitalization in Headings

Use an initial uppercase letter for the first word and all nouns, adjectives, adverbs, and verbs. Use an initial lowercase letter for all conjunctions, articles, and prepositions with less than four letters. (Use an initial uppercase letter for all prepositions of four letters or longer.)

14.4 Capitalization in Table Titles

Use sentence style (initial cap first word only).

14.5 Capitalization of Window Parts

Match capitalization in the software. Do not capitalize words such as *field*, *tab*, *pane*, *button*, *list box*, or *window*.

Example: The Personal tab is displayed.

Do not capitalize window types.

Example: A warning window is displayed.

14.6 Capitalization of Key Names

Match capitalization on the keyboard. Do not capitalize the word *key* when it follows the name of a key.

Problem: Press the Return Key.

Solution: Press the Return key.

14.7 Capitalization of Field Names

You can either match the onscreen capitalization of field names or just capitalize the first letter of each word, as long as you maintain a consistent approach to the entire document. Do not use all capital letters to indicate field names unless that is how they appear on the screen and you have decided to follow the onscreen capitalization. If there are a lot of fields to refer to and they are all heavily capitalized, following the onscreen capitalization is highly discouraged, as too many capital letters make a document difficult to read.

14.8 Capitalization of File Names

Use initial caps for all file names, but do not capitalize the word *file* when it follows the file name. The word *file* must follow all references to file names to distinguish file names from option names.

Problem: Open the New Data File.

Problem: Open New Data.

Problem: Open new data.

Solution: Open the New Data file.

14.9 Capitalization of Option Names

Use initial caps for all option names, but do not capitalize the word *option* when it follows the option name. The word *option* must follow all references to option names to distinguish option names from file names.

Problem: Select the Import New Data Option.

Problem: Select Import New Data.

Problem: Select import new data.

Solution: Select the Import New Data option.

15.0 Punctuation

Use standard American English punctuation rules. In addition to the specific points of punctuation in this section, see also the *Chicago Manual of Style*.

15.1 Using Punctuation as Commands

Many of the RPMS packages use punctuation marks as command and navigational responses. When a punctuation mark is used in this context, you must spell out the name of the mark and give a parenthetical example immediately following.

Example: Type a question mark (?) at the “Name” prompt to see a list of options.

Example: Type an ellipses (…) at the “Replace:” prompt to select all of the existing text for replacement.

Example: Type a caret (^) at the “Device:” prompt.

15.2 Compound Words

Use a hyphen to form compound words.

Exception: Use the en dash in compounds when combining open compounds.

15.3 In Numbers

Do not use a comma in four-digit numerals. Use a comma in numerals of five or more digits.

15.4 Ellipses in GUI References

When describing a part of the GUI, omit the ellipses. If, for example, the File menu has an "Open..." option, describe it as the Open option in your document.

15.5 Em Dash (—)

Use the em dash for a break in thought or abrupt change in sentence structure. See also *parentheses*. Do not use the em dash for dramatic pause.

Do not put spaces before or after the em dash.

Example: The snow—always welcomed by children—clogged the roads.

15.6 En Dash (–)

Use the en dash to connect dates, times, and numbers. Use the hyphen for compound adjectives. Use the en dash in compounds only when combining open compounds.

Examples: 1989–1995, the North Carolina–Virginia border

15.7 Hyphen (-)

To prevent ambiguity, use hyphens with a numeral in a compound modifier or in spelled-out fractions. Do not use hyphens to construct verbs, with an adverb ending in –ly, with numerals as single modifiers, with trademarked terms, or with words that are listed as unhyphenated in the Merriam Webster Collegiate Dictionary. Do not use a hyphen to allow a word to break across lines.

15.8 Parentheses ()

Use for tangential material. If the material is crucial to the sentences, parentheses are inappropriate. Use parentheses to introduce abbreviations and acronyms that you will use later or to make reference to other sections or figures.

Example: All students are required to study calculus (offered by the mathematics department).

Example: The Patient Demographic dialog box will appear (Figure 2-2).

15.9 Punctuation After Emphasis

To avoid confusion, punctuation that follows an emphasized item is not emphasized.

Example: Press **Ctrl-D**, then press **Ctrl-S**.

15.10 Punctuation In Quotes

Periods and commas go inside the quotes unless the quote is something that the user types. Other punctuation is placed with the clause it modifies.

15.11 Slash (/)

Do not put a space before or after a slash.

Example: and/or Mechanics

15.12 Space After Periods

You can use either one or two spaces after a period; however, use one or the other consistently throughout a document.

15.13 Brackets ([])

Do not use brackets ([] or {}) as a substitute for parentheses. Brackets can be used to separate editor notes from the text as long as they are removed before final production.

15.14 Colon (:)

Use the colon to introduce a list. Do not use a colon to introduce a figure or table in the text or to introduce headers.

The exceptions to this rule include the use of a colon to separate a figure number from the accompanying description in a caption (e.g., Figure 2-2: Profit graph) or when the header has two parts (e.g., 11.0 Appendix A: List of Names).

15.15 Commas

Follow standard comma rules. For items in a series, use a comma between the and/or and the final item. This is also know as the serial common. While both options are grammatically correct, OIT uses the option with the additional comma because the additional comma adds clarity.

Problem: Jane, Joe and Barry are in charge of the Radiology package.

Solutions: Jane, Joe, and Barry are in charge of the Radiology package.

15.16 Ellipsis Points (…)

Use ellipsis points (…) to show that you have omitted something from a quoted sentence or to indicate a pause when quoting displayed computer dialog text.

The ellipsis points are also used in the RPMS system to indicate that an option has a sub-menu. When you are recreating a screen with text, make sure the ellipses points appear on the recreation. When you are instructing the user to select a menu option that is followed by ellipses points on the screen, omit them.

Example:

PTRG	Patient Registration Menu…
SIT	Set Default Facility
AGX	Data Export Menu…

Example: Select the Patient Registration Menu option by typing PTRG at the “Option:” prompt.

15.17 Quotation Marks (“ ”)

Use quotation marks to indicate material that is taken verbatim from another source. This does not include boilerplate information or information from previous documentation versions.

Do not use quotation marks to excuse terms from legitimacy. If the term is not legitimate, then use another term. If you must use that term, declare the term in the glossary and make the term legitimate.

15.18 Semicolon (;)

Use a semicolon before a phrase that introduces an explanatory or summarizing statement. Use a semicolon to separate independent clauses joined by conjunctive adverbs, such as *therefore*. Use a semicolon in a series to separate items when each item contains one or more commas. (This should be a rare occurrence.)

16.0 Mechanics

16.1 Tense

Use the present tense in your writing whenever you can. Avoid the future or future passive tenses. Restrict the use of the future tense to only those circumstances that will happen at some future point in time, such as next year. Avoid conditional phrases and past tenses.

Problem: The user will type ARMS at the menu.

Solution: Type ARMS at the menu.

Problem: If you are missing any drives that might have been added to your machine, you may right-click on an empty space and…

Solution: If any drives are missing from your machine, right-click on a vacant space on the desktop and…

In narrative references to the steps taken by an imaginary user in an example, use past tense

Solution: The user typed ARMS at the menu.

16.2 Split Infinitives

Avoid split infinitives, but do not mutilate a sentence to remove one.

16.3 Adverbs and Adjectives

Use adverbs and adjectives with caution.

If an adverb is necessary to qualify the function of a component, then use the adverb. In all cases, test whether the phrase can stand alone without the adverb. A common superfluous and insulting adverb is *simply*.

If an adjective is necessary to differentiate between items, then use adjectives. In all cases, test whether the phrase can stand alone without the adjective.

Problem: Simply press the Return key when you are finished.

Problem: Pressing Ctrl+D will apply this basic macro to the selected files.

Solution: Press the Return key when you are finished.

Solution: Pressing Ctrl+D will apply the doohickey macro to the selected files.

16.4 Contractions

Do not use contractions (can’t, don’t, or isn’t) unless avoiding them makes the sentence awkward. (This is a rare occurrence.) Cannot is not considered a contraction.

16.5 Gerunds

Do not use gerunds when they could be mistaken for adjectives.

Problem: Clicking Programs opens the Programs menu. (Does the program click?)

Solution: Click on Programs to open the Programs menu.

Exceptions:

You can use a gerund in section headers (i.e., Using the Menu Editor)

16.6 Passive Voice

Use the active voice wherever you can. If you do use the passive voice, analyze the text to see if you can say the same thing in the active voice.

Problem: The Menu Editor is started from the Main Menu.

Solution: Start the Menu Editor from the Main Menu.

Exceptions: If the sentence does not make sense in the active, then use the passive but limit the occurrences. You may also use the passive voice to remove personalization and prevent brining the developer or other people as subjects into the text.

16.7 Indefinite Pronouns

Restrict the use of indefinite pronouns such as *it*, *this*, and *those*, especially at the beginning of sentences. If you must use indefinite pronouns, make sure you qualify them.

Problem: The Menu Editor is a configuration tool for the Main Menu. This is very useful in setting your system to your system requirements.

Solution: The Menu Editor is a configuration tool for the Main Menu. This tool is very useful in setting your system to your system requirements.

Solution: The Menu Editor is a configuration tool for the Main Menu. The Menu Editor is very useful in setting your system to your system requirements.

16.8 There Is/ There Are

The terms *there is* and *there are* are ambiguous. Avoid using them. Using alternative phrasing also creates stronger syntax and reduces the number of superfluous words.

Problem: There are two main menu lists in the menu tree.

Solution: The main tree contains two main menu lists.

16.9 Sentence Length

Your sentence length should not exceed 25 words. Express one idea per sentence. Try to keep procedures to less than 23 words. Express one action per procedure step. (Pressing return at the end of an entry does not require a separate procedure.)

Problem: If you would like to place a menu item onto the desktop, you can drag and drop from the menu to the desktop and it will place an icon there with all the appropriate properties set for you.

Solution: You can drag a menu item from the menu to the desktop. The drag action places an icon on the desktop with all the appropriate properties set.

Exception: Legal statements

16.10 Personal Pronouns

Do not use personal pronouns other than you, he, she, or they.

Problem: We recommend this method of moving a symbolic link.

Solution: Use this method to move a symbolic link.

16.11 Use of *May*

Replace *may* with *can* or *might*.

Problem: These settings may be accessed from the Control Panel dialog box.

Solution: These settings can be accessed from the Control Panel dialog box.

Exception: Use *may* only when you grant permission to do something.

16.12 Articles

Do not omit articles.

Problem: Open Main Menu and select item.

Solution: Open the main menu and select an item.

16.13 When and If

Use *when* for an inevitable event and *if* for a conditional event.

Examples

“When the prompt is displayed” implies that the prompt is definitely displayed.

"If the prompt is displayed" implies that the prompt might or might not be displayed.

16.14 Colloquial Language

Do not use colloquial language.

Problem: The Modem Lights Applet is a handy applet that will start your dial up connection…

Solution: The Modem Lights applet starts your dial up connection…

16.15 Conjoined Sentences

Be cautious using conjunctions such as *and* or *so* to join sentences. In most cases, it is best to create two sentences. It is more acceptable to conjoin short sentences with highly-related subjects.

16.16 Omission of That

Do not omit the *that* traditionally found in the beginning of a conditional phrase. Removing the *that* will make the sentence more difficult for non-native English speakers.

17.0 Indexing

"An index is not an outline, nor is it a concordance. It's an intelligently compiled list of topics covered in the work, prepared with the reader's needs in mind."

17.1 Index Placement and Inclusion

Indexes are optional at this time and should be placed as the very last section of a manual or second to last, where the contact information page is the last.

17.2 Selecting Words for Inclusion

Do not include a reference to every instance of a word or phrase. If you use Word to automatically create an index, you must go through all of the references and ensure their relevance.

Do not include section headings in the index unless they are a reiteration of a menu item or option. For example, if a section is called "Printing a Report," you should only include the phrase *printing a report* in the index if there is also a menu item or option called "Printing a Report."

17.3 Index Alphabetization

1. Alphabetize entries beginning with numerals as though the numerals were spelled out - "400 Club" under the Fs.
2. Alphabetize abbreviations of government agencies, broadcasting companies, publications, etc. according to the order of letters in the abbreviation, not as though the names were spelled out.
3. Alphabetize subentries according to the first principal word, ignoring any preceding prepositions and articles.

17.4 Other Index Considerations

- Capitalize the first word of each main entry; all remaining words should be lowercase unless they require capitalization for other reasons.

- Separate each entry from its page number(s) by a comma; use a colon after an entry without a page number if it is followed by a group of subentries.

- Make sure no entry consists of an adjective standing alone.

- Edit the entries to make them as concise as possible, striking out prepositions that are not absolutely necessary to the meaning.

- Combine similar entries and provide cross-references where necessary. Using cross-references avoids unnecessary repetition.

17.5 Index Layout

Type the index electronically, two columns to a page.

17.6 Index Word Choice and Capitalization

Do not use initial capitalization unless the entry is a proper name. Use gerunds whenever possible. Use the singular form for nouns. Collapse similar entries with secondary entries.

Problem:

planting bulbs

planting shrubs

planting trees

Solution:

planting
- bulbs
- shrubs
- trees

17.7 General Indexing Concepts

17.7.1 Reader Appropriateness

Are the indexed terms appropriate for the intended audience? For example: "heart attack" in a book for the general public, "myocardial infarction" in a book for health professionals; "Taxus" in a work for botanists or horticulturalists, "Yew" in a work for home gardeners.

17.7.2 Main Headings

Are the main headings relevant to the needs of the reader? Are they pertinent, specific, comprehensive? Not too general yet not too narrow? Not inane or improbable?

Do main headings have not more than 5–7 locators (page references)? If more, they should be broken down into subheadings.

17.7.3 Subheadings

Are the subheadings useful? In the example below, a) the page ranges are extensive b) the subheading "problems with Republicans" may be too general

Roosevelt, Franklin
  problems with Republicans, 1–32

Are subheadings concise, with the most important word at the beginning? For example:

Problem:

banks
  and relationship to Federal Reserve bank

Solution:

banks
  Federal Reserve regulation

Avoid unnecessary words and phrases like "concerning" and "relating to" and proliferation of prepositions and articles.

Is the number of subheadings about right? More than one column’s worth is probably too many. Are subheadings overanalyzed? Could they be combined? For example, could "dimensions" be substituted for "height," "width," and "length"? Or should some subheadings become main headings with their own subheadings instead?

Do subheadings have more than 5–7 locators? If more, they should either be broken down into sub-subheadings or be changed to main headings.

17.7.4 Double Postings

For the reader’s convenience, many subheadings should be double posted—that is, they should exist as main headings too. An example: "Cats: Siamese" and "Siamese cats." Has this been done? Double postings should, of course, have the same locators. Do they?

17.7.5 Locators (Page References)

Are the locators accurate? Check a sample of entries to see. Spot-check pagination for nonsense numbers where the hyphen or en dash may be missing, such as 18693 for 186-93. Check that elision (page ranges such as 186-93) is consistent.

When locators include roman numerals or volume numbers, does the typography make the usage clear?

17.7.6 Cross-References

Have ***see*** and ***see also*** cross-references been provided?

A ***see*** should direct the reader to a different term expressing the same concept, such as "Clemens, Samuel. ***See*** Twain, Mark" or "aerobics ***see*** exercise".

A ***see also*** should guide the reader from a complete entry to the related entries for more and different information. Examples: "Mammals: 81, 85, 105; ***see also*** names of individual mammals" "astronomy 12–14, 56, 68. ***See also*** galaxies; planets"

17.7.7 Length and Type

Is the index length adequate for the complexity of the book? An index should be 3–5% of the pages in the typical nonfiction book, perhaps 5–8% for a history or biography, and more (15–20%) for reference books.

Is there a need for more than one type of index? For example, in addition to the usual subject index, perhaps a separate name or place index is called for. If so, is there one?

17.7.8 Format

Is the type large enough to be easily read? Do the index pages look open and not crowded?

Are the main headings and subheadings (and sub-subheadings if any) distinguished from each other?

Is the organization—whether alphabetical, chronological, or other—accurate, clear, and consistent?

When an entry’s subheadings "turn a page" that is, are continued from a right-hand page to a left-hand page, the main heading should be repeated, followed by the word *continued* in parentheses. Depending on the size of the pages, continued headings might be appropriate for continuations from left to right pages, or even from left to right columns. Are they present?

Is the punctuation style consistent and clear to the reader?

18.0 User Instructions

18.1 The Return/ Enter Key

When instructing the user to press the Return or Enter key, use the phrase, “Press the Return key.” Notice that the phrase uses the word *press* instead of *hit* or *strike*. Also make sure that you capitalize the key name as it appears on the keyboard (section 14.6) and follow the name of the key with the word *key*. Do not use any additional punctuation or formatting to make the Return key reference stand out.

Only refer to the Enter key when users are expected to use the Enter/Return key on their keyboard number pad.

Problem: Press RETURN.

Problem: Hit return.

Problem: Hit <RETURN>.

Problem: Type your name and press the Enter Key.

Solution: Type your name and press the Return key.

Exception: When making notations in a recreated computer screen example, the notation **<RET>** is an acceptable way to indicate where the Return key was pressed. This Return key symbol should not be underlined, but should be bolded.

18.2 The Caret (^)

Within RPMS packages, the caret has navigational properties and is referred to frequently in the manuals. You can refer to this punctuation mark as the caret, up-hat, or circumflex, but never as the up-arrow. When referring to this punctuation mark, always include an example in parentheses.

Problem: Type the up-arrow at the next prompt.

Problem: Type the caret at the next prompt.

Solution: Type the caret (^) at the next prompt.

Solution: Type the up-hat (^) at the next prompt.

18.3 Keystrokes

Keys that the user is supposed to press are referred to by an article before the key name and the word *key* after the key name. Key names should not be set in bold text simply because they are key names.

Problem: Press **RETURN.**

Solution: Press the Return key.

Use a hyphen to connect keystrokes that are performed simultaneously. If necessary, explain this notation in the orientation section of the manual.

Example: Ctrl-D [press the Ctrl key and the D key simultaneously]

Use a comma and space to separate keystrokes that are pressed in sequence.

Example: Press Ctrl-Shift, N to display the New window. [Press the Ctrl key and the Shift key at the same time, then release and press the N key.]

18.4 Introducing Procedures

To introduce a series of procedure items, use a complete sentence ending with a colon and follow the same grammatical pattern for all introductions in a document.

Example: To print the document, follow these steps:

18.5 Describing User Selections

Describe selections in the order the user makes them.

Example: Select the File menu, then select the Open option.

18.6 Referring to System Prompts

Use double quotes around prompts used within the text. Use single quotes within double quotes only. Don’t use quotes around prompts in a recreated computer dialogue (screen shot).

The word *prompt* must follow all references to prompt names to distinguish them from files or options. When directing the user to type a response to a prompt, always follow the user instructions with the prompt name. If the prompt has any internal punctuation, include that in the prompt name reference.

Problem: Type the approval date at the Date of approval prompt.

Problem: Type the approval date at date of approval.

Problem: Type the approval date.

Solution: Type the approval date at the “Date of Approval:” prompt.

Many prompts in RPMS are followed by a default response. Default responses are not uniform throughout the IHS and are not part of the actual prompt. Do not refer to the default response when using prompts within the text.

Problem: Type P (Print) at the "Do you want to: B//” prompt.

Solution: Type P (Print) at the "Do you want to:" prompt.

19.0 Word Usage

19.1 General Guidelines

- Define new terms that are not listed in a regular dictionary the first time they appear in the text. You should include these terms in the glossary as well.
- Do not use slang or undefined jargon.
- Do not use terms that have several different meanings.
- Use your defined terms consistently throughout your documentation. Do not use synonyms.
- Ensure that your spelling is correct.
- Avoid general adjectives that can be misinterpreted. For example, "the user-friendly Windows desktop" could mean that either the desktop is user-friendly or that Windows is user-friendly.

19.2 Humanization of Computers

Avoid humanizing machine interactions. Do not apply emotions, desires, or opinions to software programs or computer systems. Do not apply a sense of location or dimension to a software application. The user cannot be **in** a text editor.

Problem: The machine remembers your choices.

Problem: The computer asks you for the current site name.

Problem: The system tells you what options to choice from.

Solution: The machine stores your choices.

Solution: The computer prompts the user for the current site name.

Solution: The system lists options to choice from.

Problem: The user will be in the text editor.

Solution: The user will be able to update the text with the text editor function.

Solution: The user will be able to update the text in the text editor window.

19.3 Latin Terms

Avoid Latin or Latinate terms. Use an equivalent English term when possible and when the Latin or Latinate term is not a social standard.

19.4 Gender

Use plurals or specific descriptions to avoid he, she, he or she, s/he, and it. See the example below. If you use plurals to avoid the gender issue, make sure that the entire sentence/ statement is in agreement with the plural subject.

Problem: The programmer writes code. He then compiles it.

Solution: The programmer writes code and then compiles it.

Solution: Programmers write code. They then compile it.

If it is not possible to avoid referring to gender, use an appropriate plural, the pronoun *you,* or the complete statement *he or she*.

Problem:

The system will prompt the user for a site name. The user must type the name of their current site.

Solution:

The system will prompt the user for a site name. Users must type the name of their current site.

The system will prompt the user for a site name. The user must type the name of his or her current site.

The system will prompt you a site name. You must type the name of your current site.

19.5 Noun Strings

Avoid noun strings. If you have one, hyphenate the words that are used as adjectives to aid comprehension.

Note: Never use a hyphen after an adverb ending in -ly.

Example: UNIX-based workstation, end-user access, newly acquired software

19.6 *Only* Placement

Place the word “only” with the sentence part it modifies.

19.7 Possessive Form of Nouns Ending In S

If a singular noun ends with an s, create the possessive form by adding 's.

Example: Dr. Seuss's books

19.8 Trademarks

Use trademarked terms as adjectives, not nouns. Mark the first instance of a trademark in the front matter and in the body of the document. Omit the trademark symbol in subsequent mentions.

Example: The Widget (TM) product offers... never Widget offers...

20.0 Frequently Misused or Misspelled Words

Use standard American English spelling rules, referring to the Merriam Webster Collegiate dictionary (on paper or online) for words not addressed in this section.

20.1 A

20.1.1 Access

Access, as a verb, is usually too general. Use a more specific word.

Problem: Access the application.

Solution: Start the application.

20.1.2 Affect

Affect is generally used as a verb. See *effect*.

Example: Changing weather affects my sinuses.

20.1.3 Allow

Avoid using the word *allow* when referring to software features. Allow implies permission. Either rewrite the sentence or use the word *enable*.

Problem: The software allows you to adjust the color of a photo.

Example: Using the software, you can adjust the color of a photo.

Example: This function enables the user to adjust the color of a photo.

20.1.4 Among vs. Between

Use *between* when describing two things.

Example: I couldn't decide between this and that.

Use *among* when describing three or more things.

Example: I couldn't decide among all these choices.

20.1.5 Appear (verb)

Use the phrase *is displayed* instead of the word *appears*.

Example: The Add New Measurement dialog box is displayed.

20.2 B

20.2.1 Backup (Noun)

A copy of a resource made as a precaution in case of loss of the original resource. Do not use *backup* as a verb; see also *back up*.

20.2.2 Back Up (Verb)

To copy files to another location as a precaution in case of loss of the original files. Do not use *back up* as a noun or adjective; see also *backup*.

20.2.3 Blank

When no information is present in a field, refer to the field as blank. Do not use *empty* when you refer to a field.

20.2.4 Bring Up (verb)

Use the word *display* or *open* instead of *bring up*.

Example: Open the Add New Measurement dialog box.

Example: Display the Add New Measurement dialog box on your screen.

20.3 C

20.3.1 Cancelled

Use *cancelled* not *canceled*.

20.3.2 Cascading Menu

Use the word *submenu*.

20.3.3 Cannot

Always one word, no apostrophe. This is not considered a contraction.

20.3.4 Check Box

Two words. No hyphen.

Definition: A square, button-like box associated with a user-selectable option. When selected, the box may be filled, checked, contain an "x," or appear pushed in. Check boxes may be grouped together in a box with a title. More than one check box can be checked.

Example: Check the **Clear All Change Bars** check box.

20.3.5 Choose

Avoid using the word *choose*. *Select* is usually more explicit.

Example: Select the menu option that best describes your file.

20.3.6 Click (verb)

Use *click* to describe mouse actions only. Use *select* to describe GUI actions.

Example: Click the right mouse button to display the pop-up menu.

20.3.7 Close

To remove a window, dialog, or user interface component from the desktop. Use in conjunction with display and open. Do not use *quit* in this context. (GUI Only)

Example: To close a window, choose File-> Close

Example: Click the Cancel button to close the dialog box.

20.3.8 Configure

To *configure* is typically a large-scale activity. By contrast, to *modify* is a smaller-scale activity. For example, you usually use the term *configure* to refer to specifying settings for the entire desktop. See also *Modify*.

Example: To configure your desktop, right-click in an open space.

Example: Modify the background color value through the Properties dialog box.

20.3.9 Consists Of

Use *has* instead of *consists of*.

Example: The main menu consists of 4 options and two submenus.

20.3.10 Contains

Use *include* instead of *contains*.

20.3.11 Co-pay

One word, hyphenated.

20.3.12 Criterion/Criteria

Criterion is singular; *criteria* are plural.

Example: Set the file criteria by right clicking each criterion individually and selecting the option that best describes your file.

20.3.13 Cross-reference

One word, hyphenated.

20.4 D

20.4.1 Data (noun)

The word *data* is used as the plural and singular of the original word *datum*. This is in concordance with the usage accepted in the software/computer industry and the argument that a piece of data (datum) is an abstract and impractical measurement of information for our purposes.

Example: Data is stored on tape.

Example: The data is up to date.

20.4.2 Database

One word. No space, no hyphen.

20.4.3 Data set

Two words. No hyphen.

20.4.4 Date range

A date range should not be referred to as a starting and ending date range; the starting and ending elements are intrinsic to the concept of a date range. Using the term date range will be sufficient. If the starting and ending date elements are important enough to mention, use the phrase *starting and ending dates* and leave out the word *range.*

Problem: The user will be prompted for a starting and ending date range.

Solution: The user will be prompted for a date range.

Solution: The user will be prompted for starting and ending dates.

20.4.5 Delete

To remove an item that you cannot restore. Do not use *remove* to describe deleting an item that you cannot restore.

20.4.6 Desire

There is no desire in technical documentation. Use *want* or *wish* instead.

20.4.7 Desktop

One word, no hyphen. Refers to the background on the screen where all windows and icons are displayed.

20.4.8 Desktop Menu

A list of choices displayed when the user clicks the right mouse button with the mouse pointer positioned on the desktop.

20.4.9 Double-click (verb)

Hyphenate *double-click* when used as a verb.

Example: Double-click the left mouse button.

20.4.10 Drop-down List Box

Hyphenate. *Drop-down* may be omitted if there are no plain list boxes on the window.

Definition: A list box displayed on the GUI as a rectangle with an activation button on the right side. When users select this button, a list is displayed. After users select an item from the list, the list box collapses to a rectangle that displays the selection.

20.5 E

20.5.1 Effect

Effect is generally used as a noun. See *affect*.

Example: One effect of changing weather is aching sinuses.

20.5.2 E-mail

Use *e-mail*. Use a hyphen. No capital letter unless the word is found at the beginning of a sentence.

20.5.3 End User (noun)

Two words. No hyphen unless used as an adjective.

20.5.4 Enter (verb)

When you are instructing the user to type specific information into specific fields, use the word *type* instead. Use *enter* when referring to higher-level or general functions.

Example: Use the Patient Registration Menu option to enter patient data into the system.

Example: Type the patient's full name at the "Select Patient Name:" prompt.

20.6 F

20.6.1 Fewer vs. Less

Use *fewer* when referring to specific numbers and measurements; use *less* when referring to general amounts.

Problem: If a customer orders less than 10 CDs ...

Solution: If a customer orders fewer than 10 CDs but more than five, the customer receives a free CD.

Solution: It takes less time to fill orders when your company uses our application.

20.6.2 Field

A part of the interface where users can type information to add data to or search a database. Also referred to as *prompt*.

20.6.3 FileMan

Short for File Manager, FileMan is a VA-based utility that works behind the scene for most RPMS packages. Do not use *File Manager*, *fileman*, or *Fileman* as synonyms.

20.6.4 From X to X

When using from/to, use only two examples.

Problem: Staff members from doctor to nurse to check-in clerk can easily navigate this system.

Solution: Staff members of all experience levels, from doctor to check-in clerk, can easily navigate this system.

20.7 H

20.7.1 Hardcopy vs. Hard Copy

One word as an adjective; two words as a noun.

20.7.2 Healthcare

One word.

20.7.3 Hit (verb)

Use *press* instead of *hit* (or *strike*).

Problem: Hit the Return key.

Solution: Press the Return key.

20.7.4 Home page

Two words, no capitalization unless it is at the beginning of a sentence or in a heading.

20.8 I

20.8.1 Impact

Do not use *impact* as a verb. Use *affect* instead.

Problem: This software change could impact your check-in process.

Solution: This software change could affect your check-in process.

20.8.2 Include

Use *include* instead of *contains*.

20.8.3 Invoke

Use *open* or *start* instead of *invoke*.

Problem: Invoke the screen saver by pressing the Esc key.

Solution: Start the screen saver by pressing the Esc key.

20.8.4 Irregardless

Use *regardless*. While there is such a word, but it is not commonly accepted.

20.9 L

20.9.1 Launch

Avoid using *launch*. Use *start* or *open* when appropriate.

> **Problem**: Launch the application by clicking the new desktop icon.
>
> **Solution**: Start the application by clicking the new desktop icon.

20.9.2 Left Side

Use this term to refer to the left side of an item. Do not use *left-hand side*.

20.9.3 Left-click (Verb)

Only use this term to avoid ambiguity when describing an action that also involves a middle-click or a right-click. Use c*lick* when the user will only be left-clicking during the procedure. (GUI Only)

20.9.4 List box

Two words. *List* is also acceptable. See also *drop-down list box*.

> **Definition**: A box containing a list of items users can select.

20.10 M

20.10.1 MailMan

Short for Mail Manager, MailMan is a VA-based utility that facilitates messaging for a number of RPMS packages. Do not use *Mail Manager*, *mailman*, or *Mailman* as synonyms.

20.10.2 Main Window

Do not use *main window* unless referring to the process of creating a help file through RoboHelp.

20.10.3 May (auxiliary verb)

May implies permission. Use *can* when appropriate.

20.10.4 Manual (User Manual, Technical Manual)

When referring to internal manuals (user manuals, technical manuals, etc.), do not use any special capitalization. If you are referring to manuals created by other companies that contain the word *manual* in their title, follow the rules for referring to titles.

Problem: Refer to the User's Manual for more information on this topic.

Solution: Refer to the user's manual for more information on this topic.

Solution: Refer to the *Microsoft Word Handbook and User Manual* for more information on this topic.

20.10.5 Modify

To modify is typically a small-scale activity. By contrast, to configure is a larger-scale activity. These changes usually involve dealing with a specific characteristic. See also *Configure*.

Example: Modify the background color value through the Properties dialog box.

Example: To configure your desktop, right-click in an open space.

20.10.6 Multi (prefix)

No hyphen. See *The Chicago Manual of Style* for exceptions.

Problem: multi-media, multi-tasking

Solution: multimedia, multitasking

20.11 O

20.11.1 Offsite/ off-site

Use *offsite*, no hyphen.

20.11.2 Onsite/ On-site

Use *onsite*, no hyphen.

20.11.3 Online/on-line

Use *online*, no hyphen.

20.11.4 Onscreen/on-screen

Use *onscreen*, no hyphen.

20.12 P

20.12.1 Pick (verb)

Use *choose* or *select* for selecting things from menus.

Problem: Pick the option you need from the menu.

Solution: Select the option you need from the menu.

20.12.2 Policyholder

One word, no hyphen. (Merriam Webster Dictionary)

20.12.3 Post (prefix)

No hyphen. See *The Chicago Manual of Style* for exceptions.

20.12.4 Pre (prefix)

No hyphen. See *The Chicago Manual of Style* for exceptions.

Problem: pre-defined

Solution: predefined

20.12.5 Press (verb)

Use *press* for keyboard actions. Use *click* for GUI actions.

Example: Press the Enter key to continue.

Example: Click the Apply button.

20.12.6 Printout/ print out

As a noun, one word, no hyphen. As a verb, two words, no hyphen.

20.12.7 Printset (noun)

One word, no hyphen.

20.12.8 Pull-down

Do not use *pull-down menu*, just *menu*. (All menus are pull-down menus, unless they're pop-up menus.) Use *drop-down* for lists.

20.13 Q

20.13.1 QMan

Short for Query Manager, QMan is a VA-based utility that works behind the scene for most RPMS packages. Do not use *Query Manager*, q*man*, or *Qman* as synonyms.

20.14 R

20.14.1 Re (prefix)

No hyphen unless the word is confusing without it.

20.14.2 Right Side

Use this term to refer to the right side of an item. Do not use *right-hand side*.

20.14.3 Run Time

As a noun, use two words. Hyphenate when using as an adjective.

Example: The system will calculate the run time for you.

Example: Type the run-time calculation at the “Total Time:” prompt.

20.15 S

20.15.1 Screen

GUI: Use *screen* only to describe the panel on the front of the monitor. Always use *window* to describe a part of the GUI interface.

Roll and Scroll: Use *screen* when referring to the window that an RPMS package is running in because many users are still using dumb terminals and do not encounter the concept of a Windows-style computer window.

20.15.2 Screenshot

Use to refer to a graphic image of an area of your desktop or your entire desktop. Do not use *screen shot*, *screen-shot*, *screen capture*, or *screen grab*.

20.15.3 Scroll Bar

Two words.

20.15.4 Setup

Noun form is one word. Verb form is two words, no hyphen. Adjectival form is one word.

Solution: The setup is complete.

Solution: We will set up the email servers after lunch.

Solution: The setup schedule was attached to my last email.

20.15.5 Shortcut Key

Use keyboard shortcut.

20.15.6 Simple and Simply

Do not use *simple* or *simply* to describe a feature or step. It is condescending.

20.15.7 Single-click

Use *click* instead of *single-click*. The only time you should specify the number of clicks is if the user is required to perform a double-click or a triple-click.

20.15.8 Stand-alone

Hyphenated as an adjective.

20.15.9 Startup, Start-up

The noun form is one word. The adjectival form is hyphenated. Note that the verb form should be *start*, not *start up*.

Solution: The configuration file is read at startup.

Solution: The names are in the start-up file.

Solution: Start the program by double-clicking the desktop icon.

20.15.10 Sub-

One word, no hyphen (Merriam Webster Collegiate Dictionary)

Example: Submenu, subfile, subrecord, etc.

20.15.11 Sync

Use *sync* instead of *synch*.

20.16 T

20.16.1 TaskMan

Short for Task Manager, TaskMan is a VA-based utility that manages queues on RPMS systems. Do not use *Task Manager*, *taskman*, or *Taskman* as synonyms.

20.16.2 Their

Do not use *their* as gender-neutral singular. Instead, rewrite the sentence to make it plural or so that it doesn't require a pronoun. *His or hers* also works to avoid the use of their, but use it sparingly. See section 19.4 for more on gender.

Problem: When the user looks at their screen, they crash the system.

Solution: Look at your screen to crash the system.

Solution: When users look at their screens, they crash the system.

20.16.3 Toolbar

One word, no hyphen.

20.16.4 Type

Use *type* instead of *enter*. Do not use *type in* or any other variation on the word *type*.

Problem: Enter your name to start the program.

Problem: Type in your name to start the program.

Solution: Type your name to start the program.

20.17 U

20.17.1 Utilize

Use *use* instead of *utilize*.

20.17.2 User Name

Two words. No caps. If the interface shows the term as one word, use one word when directly referencing the interface.

20.18 W

20.18.1 Web (Noun)

When *web* is used as a noun to refer to the World Wide Web, *Web* is initial capped (as a proper noun). When *web* is used as an adjective (web site, web page, web browser, etc.) it is treated like any other adjective, preceding the word it modifies without special capitalization, hyphenation, or spacing.

20.18.2 Web Site

Two words with a capital Web.

Problem: Download the patch from our website.

Problem: Download the patch from our web site.

Problem: Download the patch from our Website.

Problem: Download the patch from our Web Site.

Solution: Download the patch from our Web site.

20.18.3 Window

GUI: Always use *window* to describe a part of the GUI interface. Use *screen* only to describe the panel on the front of the monitor.

Roll and Scroll: Use *screen* when referring to the window that an RPMS package is running in because many users are still using dumb terminals.

20.18.4 Workaround

One word. No hyphen. This word may seem a little like slang to the user, so use it sparingly and with the appropriate audience.

20.18.5 Workflow

One word. No hyphen.

21.0 Other Terminology

21.1 Standard User Actions Terminology

These terms and phrases should be used when referring to standard user functions, remaining consistent with users other computer experience and training.

Click
Press and release the left mouse button on an item once. (GUI Only)

Example: Click the OK button.

Example: To hide a panel, click one of the hide buttons.

Click-and-Hold
Press and hold the left mouse button on an item. (GUI Only)

Example: Click-and-hold the left mouse button to initiate the capture area.

Collapse
To close an open item in a tree structure. To collapse an item in a tree structure, double-click on the item or click on the minus (-) sign beside the item. (GUI Only)

Example: You can expand and collapse the menus in the menu tree view.

Display
Use this verb to describe bringing an item on to the desktop that remains on the desktop until you specifically choose to close the item. (GUI Only)

Example: Choose Format-> Font to display the Edit Font dialog box.

Double-click, Double-click On
Press and release the left mouse button on an item twice in rapid succession. (GUI Only)

Example: To start an application from the desktop, double-click the associated icon.

Drag
To click a mouse button on an object, hold the mouse button, and move the mouse to move the object. (GUI Only)

Enter
Avoid using Enter when the instruction requires one to type a specific information set into a given field. Use type.

Example: To add a client, type A in the Patient field.

Expand
To open a closed item in a tree structure. To expand an item in a tree structure, double-click on the item or click on the plus (+) sign beside the item. (GUI Only)

> **Example**: You can collapse and expand the menus in the outline view.

Left Mouse Button
The mouse button under the first finger of the right hand in a mouse configured for right-hand use. (GUI Only)

Middle-click On
Press and release the middle mouse button on an item once. (GUI Only)

Middle-click and Hold
Press and hold the middle mouse button on an item. (GUI Only)

Middle Mouse Button
The mouse button under the second finger of the right hand in a mouse configured for right-hand use. (GUI Only)

Open
Use this verb to describe opening any user interface component. (GUI Only)

Point To
To position the pointer over a particular object or location without clicking. Use *point to* instead of *point at*. (GUI Only)

Remove
To remove an item that you can restore. Do not use *delete* when you are writing about removing an item that you can restore. (GUI Only)

Right-click
Press and release the right mouse button on an item once. (GUI Only)

Right Mouse Button
The mouse button under the third finger of the right hand in a mouse configured for right-hand use. (GUI Only)

Run
Use this verb to describe running a program, script, application, or report from the command line.

Select
To identify an object as the object on which an action is to be performed. For example, the object can be text, one or more desktop icons, a menu, etc. When you select objects, they usually appear highlighted. Do not use *choose* or *highlight* in this context. Refer to the text that is selected as the *selection*, *selected text*, *selected menu*, etc. (GUI Only)

Select
To pick an item that assigns a behavioral characteristic, value, or parameter from a predefined value or a predefined set of values.

Selected/Unselected
Use to describe the on or off state of a binary choice in a dialog. (GUI Only)

Triple-click
Press and release the left mouse button on an item three times in rapid succession. (GUI Only)

21.2 Standard Computer Terms

These terms and phrases should be used when referring to standard computer elements, remaining consistent with users other computer experience and training.

CPU (Computer Processing Unit)
The CPU processes the data. Once the data is processed, it becomes information.

Cursor
The cursor, which appears as a rectangle or blinking line, indicates when a response is needed and the position where it needs to be typed. Do not use pointer as a synonym.

Directory
A special type of file that enables you to organize other files into a hierarchical structure. Only use the term *directory* when you make specific references to the structure of the file system.

Fields
Fields on a display screen function like blanks on a form. For each field, you will find a prompt requesting specific types of data.

Folder (GUI)
A representation of a directory in a graphical program. Use the term *folder* when you document programs that use folder icons to represent directories.

Hardware
The word *hardware* refers to the various machines and physical components linked to a computer.

Internet
The global association of networks and computers that share information. Use an initial uppercase letter to refer to the Internet. (Internet is a proper noun.)

Keyboard Shortcut
An action or a sequence of actions that is performed by a combination or one or more keystrokes or mouse clicks (GUI). A keyboard shortcut provides a quicker and more convenient way to perform an action than the conventional way to perform the same action. Do not use *short-cut*, *shortcut*, *short cut*, or *keyboard accelerator* as synonyms.

Menu
The menu is a list of different options you may select at a given time. To choose a specific task, select one of the items from the list by entering the established abbreviation or synonym at the appropriate prompt.

Permission
A setting assigned to each file and directory that determines which users have access to read, write, and execute its contents.

Plug-in (GUI Only)
A supplementary program that you can add to an application to enhance the functionality of the application. Do not use *plugin or plug in*.

Pointer (GUI Only)
A small arrow or other symbol on your screen that you move with a mouse or other pointing device. Do not use the term *cursor* as a synonym for *pointer*. If there is any ambiguity about what the term *pointer* refers to, use the term *mouse pointer*.

Privileges
A set of special permissions granted to a user to perform various operations on a system.

Prompt
The *prompt* is an instruction the computer displays on your screen, specifying the type of information the computer requires to continue.

Software
Software allows interaction with the computer components (hardware). A software program is a set of instructions that control what you see on your screen, how

information is entered, and what the computer does with the information or instructions you enter.

System Administrator
A user with root privileges on a UNIX system. This term may have a slightly different meaning to IHS users because many of the RPMS programs are referred to as system; therefore, the owners or managers of a particular package could also be referred to as a system administrator. When using this term, be sure to define it in the glossary or the orientation section of the manual. Avoid using *superuser* or *root* as synonyms.

UNIX
A multi-user, multitasking operating system. UNIX is a registered trademark of the Open Group. The Open Group spells UNIX in all uppercase and this has become the industry standard. Do not use *Unix* or any other non-standard term unless you have to directly quote an (inaccurate) interface.

Web site
A location on the World Wide Web. See section 20.18.2 for rules on spelling and capitalization.

World Wide Web
A system of Internet servers that support HTML documents. You can click on links in HTML documents to view other documents on the World Wide Web. Use initial uppercase letters because this is a proper name. You can shorten *World Wide Web* to *Web* when you are clearly referring to the World Wide Web (Notice the capital W in *Web*). For most users, this term is also interchangeable with *Internet*.

21.3 Standard RPMS Terminology

These terms and phrases should be used when referring to RPMS computer elements and functions, remaining consistent with other package manuals.

Computed Field
This field creates a value by performing an operation on values in other fields.

Database
A database is a collection of files containing information that may be used for many purposes. Storing information in the computer helps in reducing the user's paperwork load and enables quick access to a wealth of information. Databases are comprised of fields, records, and files.

Date Field
This field type only accepts a pre-specified variety of date formats.

Fields
Fields are a collection of related information that comprises a record. Fields on a display screen function like blanks on a form. For each field, you will find a prompt requesting specific types of data. There are nine basic field types in RPMS programs, and each collects a specific type of information.

Files
Files are a collection of records with like information stored together (i.e., Patient File).

Free Text Field
This field type will accept numbers, letter, and most of the symbols on the keyboard. There may be restrictions on the number of characters you are allowed to enter.

Numeric Field
This field type only accepts numbers. Restrictions apply to the length of the response.

Pointer to Files Field
A pointer is a field that directs the computer to another file for information.

Records
A record is comprised of a group of fields. All records have names (i.e., a patient name). All data associated with a particular name will be located in the same record.

Set of Codes Field
This field type usually accepts one or two characters. This field type is often used when Yes/No responses are required.

Time Field
This field type only accepts a pre-specified variety of time formats.

Variable Pointer Files
The variable pointer file performs like the pointer to files with the exception that this field can take a value from one or more files.

Word Processing Field
This is a field that allows you to write, edit, and format text for letters, MailMan messages, etc.

22.0 References and Sources

Computer-related Content
Computer-related spelling and usage issues were decided using www.Webopedia.com and www.m-w.com (Merriam Webster Online Dictionary).

General Content
A significant amount of content came from the online style guide created by Scriptorium found online at http://www.scriptorium.com/Standards/ and the GNOME Documentation Project Style Guide at http://www.developer.gnome.org/documents/style-guide/

IHS/RPMS Content
Some of the IHS/ RPMS specific content came from Appendix F of the 2005 SAC.

Indexing Content
Much of the indexing section came from the Prentice Hall Author's Guide (http://www.prenhall.com/author_guide/indexing.html) and the American Society of Indexers' (ASI) Index Evaluation Checklist (http://www.asindexing.org/site/checklist.shtml).

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